Cases Report

This module demonstrates the steps to take to obtain a Cases Filed Report in the CM/ECF system. This report can be used to monitor cases that have been filed, discharged, dismissed, closed, and converted.

STEP 1   Click the Reports hypertext link on the CM/ECF Main Menu.

STEP 2   The **Reports Menu** screen displays.

   ◆   Click the Cases hypertext link.

STEP 3   The **Report Selection Options** screen displays. **(See Figure 1)**
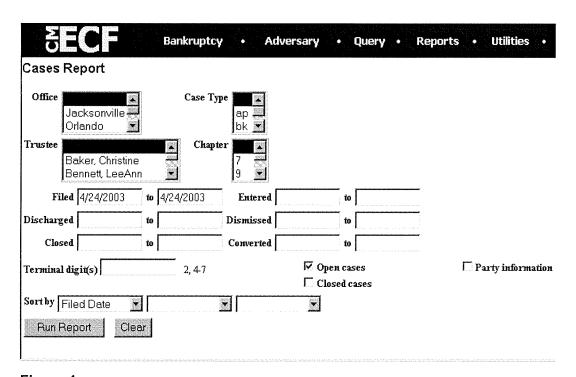

Figure 1

   ◆   The **Office** category defaults to 'blank' which means 'all' Offices will be included in the Cases Report. If you wish to limit the report to a specific Office, click the down arrow ▼ to select the Office. You may select more than one Office by holding down the **[Ctrl]** key and clicking on the additional office names.

   ◆   The **Case Type** category defaults to 'blank' which means 'all' Case Types will be included in the report. If you wish to limit the report to a specific Case Type, click the down arrow ▼ to select the Type. You may select more than

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one Case Type by holding down the **[Ctrl]** key and clicking on the additional choices.

◆   The **Trustee** category defaults to 'blank' which means 'all' Trustees will be included in the Cases Report. If you wish to limit the report to a specific Trustees, click the down arrow ▼ to select the Trustee. You may select more than one Trustee by holding down the **[Ctrl]** key and clicking on additional Trustee names.

◆   The **Chapter** category defaults to 'blank' which means 'all' Chapters will be included in the Cases Report. If you wish to limit the report to a specific Chapter, click the down arrow ▼ to find the Chapter. You may select more than one Chapter by holding down the **[Ctrl]** key and clicking on additional Chapter numbers.

◆   There are various ways to limit the results of the Cases Report. Any combination (or none) of these options may be chosen. The options are:

   ◆   **Filed**; limits the report to cases filed during a specific period of time.

   ◆   **Entered**; limits the report to cases entered on the system during a specific period of time.

   ◆   **Discharged**; limits the report to cases discharged during a specific period of time.

   ◆   **Dismissed**; limits the report to cases dismissed during a specific period of time.

   ◆   **Closed**; limits the report to cases closed during a specific period of time.

   ◆   **Converted**; limits the report to cases converted during a specific period of time.

   ◆   The **Terminal Digits** field is available if you wish to limit the report to a specific terminal digit(s).

   ◆   The **Open Cases** radio box is automatically checked. If you wish to only see closed cases, un-check the Open Cases radio box and select Closed Cases.

   ◆   Click to place a checkmark in the **Party Information** radio box if you wish the report to include Party Information.

   ◆   Click to place a checkmark in the **Closed Cases** radio box if you wish the report to include Closed Cases.

   ◆   Click the down arrow ▼ to reveal the list of options in the **Sort By**

field. The report may be sorted by: Filed Date, Entered Date, Case Number, Terminal Digit, Case Type, Office, and Trustee. Up to three sort criteria may be chosen. The default is one sort, based upon Filed Date.

◆   When all selections are correct, click **[Run Report]** to continue.

Note: To return to the original defaults and begin again, click **[Clear]**.

STEP 4   The **Cases Report** displays. **(See Figure 2)**

| 8:02-bk-00051-TEB | bk | 7 | Marlo Thomas | Baynes Smith | *Filed*: 09/25/2002 | *Office*: Tampa *Asset*: Yes *Fee*: Paid *County*: Hillsborough |
| 8:02-bk-00052-PMG | bk | 7 | Ozzie Osborne | Glenn Woodard | *Filed*: 09/25/2002 *Converted*: 11/19/2002 | *Office*: Tampa *Asset*: Yes *Fee*: Paid *County*: Hillsborough |

Figure 2

◆   To print a copy of the report, click the browser **[Print]** icon.